

20. Under advisement from January 23, 2024 (Item No. 12): Receive report from the Technology Services and Solutions Department relating to the Customer Experience Program. (ID# 24-5334)

County of Santa Clara

Technology Services and Solutions Department

FY24-27 Customer Service Program

Vision and Mission

The development of a Customer Service program will bring our customers' voices to the technologies in which we invest, consistently aligning service offerings with users' needs and expectations. We will strive to understand our customers and the ways they work before defining our solutions. This customer-centric approach involves listening to what our customers are saying and collaborating to define solutions that work for them. The purpose is to measure, understand, and improve the customer experience across every part of the County. We will ensure that seamless and intuitive services are defined and delivered to meet the needs of our customers in alignment with the County's broader objectives. Our six primary customer service operational goals are:

1. Establishing customer groups to understand what our customers want.
2. Formalizing our response to customer feedback.
3. Providing training sessions focused on customer service.
4. Evaluating our current TSS service portfolio.
5. Focusing on user friendly solutions and collaboration.
6. Investing in a robust service management platform that is reflective of the size, scope, and needs of the County's workforce.

1. *Customer Groups*

Beginning in spring 2024, TSS will initiate customer groups, asking them a series of questions. Customer effort questions are a standard way of measuring customer experience. An example question is asking "Does TSS makes your job easier or harder?" Examples of other questions include how someone may have felt after interacting with TSS and what challenges they may have encountered with TSS. This customer-first process will help us understand the challenges or obstacles our customers face and establish a mechanism for understanding their unique perspectives and expectations. By leveraging qualitative and unstructured feedback, we will build a series of initiatives based on these discussions. We will communicate back to the customer groups about how their feedback was implemented.

2. *Survey Response*

Transactional Surveys

Ticket-based transactional surveys are emailed to customers after a ticket is resolved by TSS. The survey is based on an algorithm in TSS' IT Service Management software. The survey is comprised of five multiple choice (strongly agree to strongly disagree) questions about how

satisfied the customer is with the outcome of the ticket resolution, and a section for comments. Our score for FY24 to date is 92% based on 6,350 surveys. Under the Customer Service program, we are establishing a subcommittee comprised of members from each of the TSS divisions to formalize our response to the surveys. These members will be responsible for reviewing the surveys to analyze trends within their service areas. In addition, they will be responsible for talking to customers who had suboptimal experiences so we can improve our approach to service delivery.

The outcome of this analysis is to develop action plans to improve our services. By using a continuous quality improvement approach, TSS will be enabled to respond quickly to issues with our service delivery chains. This committee will also be tasked to improve our current 12% survey response rate to an industry standard rate of 30%.

Net Promoter Score (NPS) Survey

According to our NPS survey for the last year, our overall score is 93% of approximately 1,374 employees who stated they would choose TSS as their IT service provider over other providers in the industry. The scores are evaluated per each vertical that TSS supports. Comments can also be entered on the survey. As part of the Customer Service Survey Response subcommittee, the participants will be tasked with reviewing negative surveys and reviewing all comments to identify trends or glean any actionable items. Additionally, while the overall score is very high relative to any industry standard, our NPS return rate is only 16% as compared to an industry response rate of 25%. We will also review ways to improve the overall response rate to the NPS.

3. Customer Service Training

TSS offered a customer empathy class in 2022. In CY24, TSS will continue offering training sessions that focus on customer service best practices, communication, and customer empathy. Training in customer service and empathy equips TSS with the skills necessary to understand and effectively respond to customer needs and emotions. This awareness leads to improved customer satisfaction as customers feel heard, understood, and valued. Training programs related to empathy also make TSS staff feel valued and supported by their organization.

4. TSS Service Portfolio Redesign and Process Improvement

The TSS Service Portfolio maintains a comprehensive list of an estimated 40 IT services that are provided to TSS internal and external departments. During CY24, we are evaluating all IT services and understanding how they are consumed, if they meet the current needs of the business, and whether our customers are satisfied. The services will be redesigned and mapped from the customer's vantage point aiming at more transparency and a frictionless experience for our 23,000 employees. We will begin our evaluation with our highest volume services including telephony, workstation, and County mobile devices. An early result of the telephony review

includes removing desk phones and replacing them with soft phones where business appropriate.

In addition to this overall review, we will map internal business processes and make it simpler for customers to understand where to access an internal County service, such as IT professional services or an IT service, for example on-boarding a new employee (e.g., obtaining logins and acquiring a laptop) or establishing wireless internet service for a new building. This extensive services evaluation will realign our solutions with the needs of the customer.

5. *User-Friendly Solutions and New Technology*

Whether solutions are procured or built internally, the solutions must be user friendly and intuitive. TSS will add steps in our solution acquisition process to prioritize user-friendly interfaces and documentation. Our current implementation process involves actual users in the testing and acceptance phase of new applications or system upgrades. By updating and adhering to our processes, we can ensure that the voice of the customer is being heard and understood when systems are selected, implemented, or upgraded.

Consistent with industry practices, TSS has established workshops on technology trends so IT staff can understand how new technologies may benefit customers. Our County technology partners (Office of the County Counsel, Privacy Office, and Information Security Office), as well as our customers, have been involved in these workshops. Additionally, TSS encourages learning from the rich ecosystem of the Silicon Valley by attending professional development opportunities.

By fostering continuous collaboration between TSS and other County departments, these communications ensure that technological solutions align with customer needs and are modern, secure, and efficient.

6. *TSS IT Service Management (ITSM) Platform*

IT Service Management (ITSM) refers to the entirety of activities, processes, and policies designed to form, deliver, manage, and improve the way IT is used within an organization. The primary goal of ITSM is to ensure that IT services are aligned with the needs of the business and deliver value to customers. In 2020, TSS began our ITSM journey in earnest by implementing the County's first ITSM application based on Information Technology Infrastructure Library (ITIL). While this application has served us well as we began our maturity journey, we must seek out a more robust and complete IT service management application for the County. We need this new application now more than ever to improve the services we offer to our customers.

TSS is currently in the process of developing a request for proposals (RFP) for a new ITSM application via County Procurement. The RFP covers all aspects of ITSM including incident and request management, knowledge management, change management, asset and warehouse

management, major incident, problem management, modern analytics, and an enterprise portal (aka Ask Clara). While the new application must serve TSS operational needs, it must also provide a portal for other County services that our customers or our constituents could possibly request. An enterprise portal could potentially include a consolidated service system for facilities, biomed, and procurement requests. This enterprise approach to ITSM will ensure that we can further enhance the customer experience, not only for TSS services, but for the broader organization.

By implementing a sophisticated and comprehensive ITSM application for the County, we will increase our engagement at the business level by providing groundbreaking functionality to provide ease of use to our customers and knowledge-based information for their issues, as well as the ability to easily customize workflows (e.g., employee on-boarding and off-boarding), a mobile platform, and an enterprise approach to all services used in the County. This will enable us to produce more transparent and dependable analytics to measure our outcomes and identify common issues and trends.

In addition, we will provide our TSS staff with a state-of-the-art tool to improve our responses to incidents and requests in terms of quality and time. Predictive analysis and key performance indicators (KPIs) are critical components of the ITSM selection process. Predictive analytics can be used to monitor systems proactively to identify potential anomalies and issues before they impact customers, minimize downtimes, and are used to anticipate future customer needs. With a new system, we can produce routine KPIs and distribute them at the individual, management, executive, and service levels. The KPIs will be used to gauge performance, identify areas of improvement, and evaluate changes. Incorporating predictive analysis and KPIs into an ITSM tool empowers organizations to transform their IT operations from reactive to proactive, thus elevating IT and customer satisfaction.

TSS is vetting top tiered ITSM vendors as candidates to receive the RFP. At least two prominent vendors in this preliminary list are in Silicon Valley. The RFP will be completed in April followed by the procurement process. The current plan is to implement the application in a phased approach, the first being to replace the existing ITSM application which is at end of life in December 2026. The second phase will focus on an enterprise approach to services. Additional costs and resources will be required for the new application.

Conclusion

With our new customer service strategy and goals, TSS is emphasizing a voice of the customer approach. By implementing a rigorous and defined customer strategy in support of the TSS Strategic Plan, we will bring customers (aka the human experience) to the forefront of all our services and applications. We are eager to update the Board on our achievements in this critical area. We are proposing a follow-up report in a year to discuss our progress towards our customer experience journey.

TSS Strategic Plan

Goal 4

Enhanced Customer Service Plan



TECHNOLOGY
SERVICES AND SOLUTIONS



Overview

While TSS has made steady strides in improving customer service, we recognize it is a continuous quality improvement process. Incremental changes and strategic initiatives are crucial to enhancing our interactions with our customers and improving overall satisfaction with TSS services. Goal 4 in the TSS Strategic Plan for FY24-26, Enhanced Customer Service, highlights our commitment to improve the services we provide to our customers. The objective is to deliver IT solutions that increase productivity and improve efficiency. Benefits of this approach include reduced customer effort and increased customer satisfaction.

Customer Service Program Mission and Vision

The development of a Customer Service program will bring our customers' voices to the technologies in which we invest, consistently aligning service offerings with their needs and expectations. We will strive to understand our customers and the ways they work before defining our solutions. This customer-centric approach involves listening to what our customers are saying and collaborating to define solutions that work for them. The purpose is to measure, understand and improve the customer experience across every part of the County. We will ensure that seamless and intuitive services are defined and delivered to meet the needs of our customers in alignment with the County's broader objectives.

Our Customer Service operational goals are:

- 1 Customer Engagement**
Establishing customer groups to understand what our customers want.
- 2 Customer Responsiveness**
Improving service quality by systematically analyzing customer feedback and taking action.
- 3 Customer Service Training**
Providing training sessions focused on customer service.
- 4 Service Portfolio & Process Improvement**
Evaluating our current TSS service portfolio.
- 5 Customer-driven Solutions**
Ensure technological solutions are intuitive, user-friendly, and aligned with customer needs.
- 6 IT Service Management**
Investing in a robust service management platform that is reflective of the size, scope, and needs of the County's workforce.

Goal 1

Customer Engagement

Establishing customer groups to understand what our customers want.

Measurable Outcome: Better alignment of customer input to TSS processes.

MEASURE OF SUCCESS



IMPLEMENT 80%

of Customer Group's
Action Items

Initiatives

1. Initiate customer groups in Spring 2024 to directly engage with customers and collect qualitative feedback.
2. Develop a standard set of questions focusing on customer effort and satisfaction to gauge TSS' impact on our customers' work.
3. Utilize feedback from customer groups to inform improvements and communicate back the changes implemented based on their input.
4. Track the implementation of feedback into service improvements and measure the resultant change in customer satisfaction.

Goal 2

Customer Responsiveness

Establishing customer groups to understand what our customers want.

Measurable Outcome: Improve service quality by systematically analyzing customer feedback from surveys and taking action.

MEASURE OF SUCCESS

93%

Net Promoter Score



92%

Customer Satisfaction



Transactional Survey Initiatives

1. Assemble a subcommittee with members from each TSS division to review survey responses.
2. Assign specific members to analyze trends and feedback within their service areas.
3. Develop a standardized process for reviewing and categorizing feedback from transactional surveys, using a continuous quality improvement approach.
4. Identify common issues and trends that lead to suboptimal customer experiences.
5. Establish a protocol for reaching out to customers who report poor service experiences.
6. Utilize feedback to inform targeted service improvements.
7. Implement reminders, incentives, or simplified survey processes to encourage higher response rates.
8. Monitor and adjust strategies based on effectiveness in improving response rates.

Net Promoter Score Survey Initiatives

1. Review NPS survey responses to evaluate satisfaction across different TSS verticals.
2. Assess comments for actionable insights, focusing on negative feedback to identify improvement opportunities.
3. Create a system for sharing insights from NPS surveys with relevant teams and divisions.
4. Use data to drive continuous improvement in services and customer experiences.
5. Explore and test various methods to boost participation in NPS surveys, such as through communication campaigns or gamification.
6. Evaluate the effectiveness of different approaches and refine strategies accordingly.
7. Develop initiatives to engage customers in providing feedback, emphasizing the impact of their responses on service improvement.
8. Recognize and reward customers for their valuable input to encourage ongoing participation.

Goal 3

Customer Service Training

Providing training sessions focused on customer service.

Measurable Outcome: Train all primary TSS customer-facing staff in customer service best practices, approximately 250 staff members.

MEASURE OF SUCCESS



100%

of Customer-facing Staff
Trained in Customer
Service Best Practices

Initiatives

1. Continue offering training sessions focused on customer service best practices, communication, and empathy.
2. Equip TSS staff with the skills necessary to understand and effectively respond to customer needs, leading to improved customer satisfaction.
3. Reinforce the value of empathy in customer interactions, ensuring customers feel heard, understood, and valued.
4. Measure the impact of training on customer interactions through follow-up surveys and feedback mechanisms.

Goal 4

Service Portfolio Redesign and Process Improvement

Evaluating our current TSS service portfolio.

Measurable Outcome: Reduction in service delivery times and increased customer satisfaction with redesigned services.



Initiatives

1. Conduct a comprehensive evaluation of the TSS service portfolio to assess alignment with current business needs and customer satisfaction.
2. Redesign services from the customer's perspective, focusing on high-volume services such as telephony, workstation, and County mobile devices.
3. Simplify internal business processes and improve transparency in accessing County services, realigning solutions with customer needs.
4. Track and report on the reduction in service delivery times and improvements in customer feedback for redesigned services.

Goal 5

Customer-driven Solutions

Ensure technological solutions are intuitive, user-friendly, and aligned with customer needs.

Measurable Outcome: Begin collecting user satisfaction ratings for new or upgraded systems and applications. After baseline is established, increase satisfaction by 10%.



Initiatives

1. Design a process to collect and analyze user feedback on new or upgraded systems to measure satisfaction and identify areas for improvement.
2. Implement a solution acquisition or change process that prioritizes user-friendly interfaces and documentation.
3. Involve actual users in the design, testing and acceptance phases of new applications or system upgrades to incorporate the Voice of the Customer.
4. Organize workshops on technology trends and encourage continuous learning to ensure technological solutions are modern, secure, and efficient.

Goal 6

IT Service Management (ITSM)

Investing in a robust service management platform that is reflective of the size, scope, and needs of the County's workforce.

Measurable Outcome: Reduction in incident resolution times by one day and improvement in service request fulfillment rates by two days.



Initiatives

1. Develop and issue a request for proposal for a new, comprehensive ITSM application that meets the evolving needs of the County.
2. Implement the new ITSM application in a phased approach, focusing first on replacing the existing system and then on adopting an enterprise approach to services.
3. Incorporate predictive analytics and key performance indicators into the ITSM tool to enable proactive IT operations and improve customer satisfaction.
4. Monitor and report on key ITSM metrics such as incident resolution times and service request fulfillment rates to gauge the impact of the new ITSM application. Resolve service requests two days faster and incidents one day quicker.

County of Santa Clara
Technology Services and Solutions Department



24-5334

DATE: April 16, 2024

TO: Board of Supervisors

FROM: Nina D'Amato, Chief Information Officer

SUBJECT: Response to Board Referral Relating to Customer Service

RECOMMENDED ACTION

Under advisement from January 23, 2024 (Item No. 12): Receive report from the Technology Services and Solutions Department relating to the Customer Experience Program.

FISCAL IMPLICATIONS

There are no fiscal implications associated with the recommended action. The Technology Services and Solutions Department (TSS) will return to the Board of Supervisors in the future with a request for additional funding through the IT Stability Fund for a new information technology service management application.

REASONS FOR RECOMMENDATION AND BACKGROUND

Per the Board of Supervisors' referral of January 23, 2024, put forward by Supervisor Simitian, TSS was asked to present options for the most modern innovations aimed at providing exceptional customer service to County agencies and departments.

Since 2017, when the Management Audit Division reported that TSS' customer ticket system (Information Services Department (ISD) at the time) only tracked 39% of tickets, and basic data about the requests were not consistently tracked, we have taken multiple steps to improve our customer experience:

2019: TSS had three separate service desks for ISD, Social Services Agency (SSA) and the County of Santa Clara Health System (Health and Hospital System at the time). These service desks were centralized to improve customer service delivery by standardizing ticket processes, streamlining operations and achieving economies of scale. The TSS Service Desk is available 24/7 and acts as the single point of contact for all TSS-related issues and requests.

TSS offered instructor-led IT Infrastructure Library (ITIL) foundation training to staff until 2023. ITIL is a set of practices and a framework for IT service management (ITSM) focused on creating, delivering, and continuously improving technology enabled services. These

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practices are designed to align IT services with the needs of the business. A total of 465 TSS associates completed the training.

2020-2022: TSS replaced an antiquated legacy IT service management (ITSM) application and implemented a new ITIL-based software application. This application is used primarily for incidents, requests, hardware asset management, change management, major incident management and problem management. The software also provided the platform for an IT service portal, Ask Clara, which our customers use to submit approximately 50% of TSS' tickets. This application also submits an algorithm-based transactional survey for individual tickets upon resolution. Our overall score for Calendar Year 2023 was 92%.

2021: TSS added six full-time employees to the service desk to improve response times. While still understaffed by ticket-based metrics, these additional employees improved our response times to our customers.

TSS initiated a Net Promoter Score (NPS) survey with the goal of reaching every County employee at least once a year. The survey asks this question: If given the choice, would you choose TSS as your IT service provider? In May 2023, the survey was changed from quarterly to monthly. Approximately 2,000 surveys are submitted each month, and TSS associates are excluded. Our aggregate score is 93%.

2022: To improve customer experience, all TSS Service Desk and Field Support staff completed a customer empathy training program. The virtual instructor-led class titled "Exceptional Customer Service Training" was provided by a TSS vendor. This class emphasized customer service skills and focused on using communication to improve our response to our customers. The class was very well received, and approximately 100 TSS staff members completed this course.

While TSS has made steady strides in improving customer service, we recognize it is a continuous quality improvement process. Incremental changes and strategic initiatives are crucial to enhancing our interactions with our customers and improving overall satisfaction with TSS services. Goal 4 in the TSS Strategic Plan for Fiscal Years (FY) 2024-2026, Enhanced Customer Experience (attached), highlights our commitment to improve the services we provide to our customers. The objective is to deliver IT solutions that increase productivity and improve efficiency. Benefits of this approach include reduced customer effort and increased customer satisfaction.

In support of this strategic initiative, we are developing a Customer Experience program focused on improving the way TSS interacts with the customer in a systematic approach. Customer experience operational goals include customer groups, survey responses, and IT service evaluations. Another customer experience related goal focuses on implementing an advanced information technology service management application so we can continue to modernize our IT services and processes to improve our ability to respond to our customers'

needs. Please refer to the attached *FY24-27 Customer Experience Program* for more details on our goals and the metrics established to measure progress and achievement.

CHILD IMPACT

The recommended action will have no/neutral impact on children and youth.

SENIOR IMPACT

The recommended action will have no impact on senior residents.

SUSTAINABILITY IMPLICATIONS

The recommended action will have no/neutral sustainability implications.

STEPS FOLLOWING APPROVAL

Please send notification of completed processing to Nina D’Amato, Ameen Moslehi, Jecelyn Zaha, and Lisa Bito.

ATTACHMENTS:

- FY 24 27 Customer Experience Program
- FY 24 26 TSS Strategic Plan Goal 4 CX Operational Plan

County of Santa Clara

Technology Services and Solutions Department

FY24-27 Customer Service Program

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TSS Strategic Plan

Goal 4

Enhanced Customer Service Plan



TECHNOLOGY
SERVICES AND SOLUTIONS



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Goal 1

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Measurable Outcome: Better alignment of customer input to TSS processes.

MEASURE OF SUCCESS



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6. Utilize feedback to inform targeted service improvements.
7. Implement reminders, incentives, or simplified survey processes to encourage higher response rates.
8. Monitor and adjust strategies based on effectiveness in improving response rates.

Net Promoter Score Survey Initiatives

1. Review NPS survey responses to evaluate satisfaction across different TSS verticals.
2. Assess comments for actionable insights, focusing on negative feedback to identify improvement opportunities.
3. Create a system for sharing insights from NPS surveys with relevant teams and divisions.
4. Use data to drive continuous improvement in services and customer experiences.
5. Explore and test various methods to boost participation in NPS surveys, such as through communication campaigns or gamification.
6. Evaluate the effectiveness of different approaches and refine strategies accordingly.
7. Develop initiatives to engage customers in providing feedback, emphasizing the impact of their responses on service improvement.
8. Recognize and reward customers for their valuable input to encourage ongoing participation.

Goal 3

Customer Service Training

Providing training sessions focused on customer service.

Measurable Outcome: Train all primary TSS customer-facing staff in customer service best practices, approximately 250 staff members.

MEASURE OF SUCCESS



100%

of Customer-facing Staff
Trained in Customer
Service Best Practices

Initiatives

1. Continue offering training sessions focused on customer service best practices, communication, and empathy.
2. Equip TSS staff with the skills necessary to understand and effectively respond to customer needs, leading to improved customer satisfaction.
3. Reinforce the value of empathy in customer interactions, ensuring customers feel heard, understood, and valued.
4. Measure the impact of training on customer interactions through follow-up surveys and feedback mechanisms.

Goal 4

Service Portfolio Redesign and Process Improvement

Evaluating our current TSS service portfolio.

Measurable Outcome: Reduction in service delivery times and increased customer satisfaction with redesigned services.



Initiatives

1. Conduct a comprehensive evaluation of the TSS service portfolio to assess alignment with current business needs and customer satisfaction.
2. Redesign services from the customer's perspective, focusing on high-volume services such as telephony, workstation, and County mobile devices.
3. Simplify internal business processes and improve transparency in accessing County services, realigning solutions with customer needs.
4. Track and report on the reduction in service delivery times and improvements in customer feedback for redesigned services.

Goal 5

Customer-driven Solutions

Ensure technological solutions are intuitive, user-friendly, and aligned with customer needs.

Measurable Outcome: Begin collecting user satisfaction ratings for new or upgraded systems and applications. After baseline is established, increase satisfaction by 10%.



Initiatives

1. Design a process to collect and analyze user feedback on new or upgraded systems to measure satisfaction and identify areas for improvement.
2. Implement a solution acquisition or change process that prioritizes user-friendly interfaces and documentation.
3. Involve actual users in the design, testing and acceptance phases of new applications or system upgrades to incorporate the Voice of the Customer.
4. Organize workshops on technology trends and encourage continuous learning to ensure technological solutions are modern, secure, and efficient.

Goal 6

IT Service Management (ITSM)

Investing in a robust service management platform that is reflective of the size, scope, and needs of the County's workforce.

Measurable Outcome: Reduction in incident resolution times by one day and improvement in service request fulfillment rates by two days.



Initiatives

1. Develop and issue a request for proposal for a new, comprehensive ITSM application that meets the evolving needs of the County.
2. Implement the new ITSM application in a phased approach, focusing first on replacing the existing system and then on adopting an enterprise approach to services.
3. Incorporate predictive analytics and key performance indicators into the ITSM tool to enable proactive IT operations and improve customer satisfaction.
4. Monitor and report on key ITSM metrics such as incident resolution times and service request fulfillment rates to gauge the impact of the new ITSM application. Resolve service requests two days faster and incidents one day quicker.